

Stress Management Policy

Version	1.2
Approving Body	Trust Board
Date ratified	13 July 2026
Date issued	1st September 2026
Review date	30th September 2029
Owner	Director of People & Culture
Applies to	All Trust Schools, all Trust staff

Version	Date	Reason
1.0	October 2020	To establish a Trust wide policy
1.1	October 2023	Periodic review
1.2	September 2026	Amendment to sections 3, 4, revised appendix 1 & added appendix 2

Contents

1. Introduction 3
 2. What is stress? 3
 3. Signs of stress 3
 4. Support Available 4
 5. Record keeping and confidentiality 5
 6. Review of policy 5
- Appendix 1: Guidance for managers and employees on dealing with stressful situations in schools 6
- Appendix 2: Equality Impact Assessment

1 Introduction

1.1 Initio Learning Trust values our staff health and wellbeing alongside our legal duty to ensure the health, safety and welfare of the employees as far as reasonably practicable and to have reasonable care for the health and safety of our employees. This includes taking steps to minimise the risk of stress or stress-related illnesses. We are committed to identifying, tackling and preventing the causes of work related stress and aim to promote a culture of care and mutual support to minimise stress and to ensure all employees are able to do their job to their best ability. This in turn will help us provide high quality teaching and learning for our students.

1.2 This policy sets out our approach to managing stress in the workplace.

1.3 Also contained within the policy is practical guidance for managers and employees on how to navigate and manage stressful situations set out in **appendix 1**.

1.4 This policy applies to all staff at the school (teachers and support staff), referred to as 'employee' within this document.

1.5 This policy has been implemented following consultation with the staff and the recognised trade unions.

1.6 This policy does not form part of any employee's contract of employment and may be amended at any time.

2 What is stress?

2.1 The Health and Safety Executive (HSE) defines work-related stress as ***“the adverse reaction people have to excessive pressures or other types of demand placed on them at work”***. They state that stress is not an illness but a ***“state”*** and that illness, whether mental and/or physical, develops as a result of stress which is prolonged and excessive.

2.2 A certain amount of pressure is a normal part of most jobs and it can be beneficial in helping to keep an individual motivated. However, there is an important distinction between working under pressure and when pressure becomes excessive and produces stress, which can be detrimental to health. We recognise that what triggers stress and the capacity to deal with stress varies from person to person.

2.3 Stress may be experienced as a result of the workplace, external factors or a combination of both. Workplace factors could include the nature of the employee's work, the volume of the work, working hours, environmental factors, changes such as a restructure or redundancy programme or bullying or harassment by colleagues or third parties.

2.4 The Management Standards for work related stress define the way an organisation manages the risks from work related stress. There are six key areas that cover the primary sources of stress at work that if not managed effectively could lead to poor health, and reduced productivity and increased absence. These are Demands, Control, Support, Relationships, Role and Change. An examination of these areas forms part of the stress risk assessment process that demonstrates good practice in managing stress .

3 Signs of stress

3.1 Some common signs of stress are listed below. However, experiencing one or more of these does not necessarily give an indication of stress.

- Persistent or recurrent moods, for example anger, irritability, detachment, worry, depression, guilt and sadness, mood swings (being tearful or over sensitive).
- Physical effects e.g. aches and pains (headaches, back ache, neck ache), raised heart rate, increased sweating, dizziness, blurred vision, skin or sleep disorders.
- Poor and/or changed behaviours for example, increased absence levels (including arriving late at work), difficulty concentrating or remembering things, inability to switch off, loss of creativity, loss of motivation, making more errors (poor performance), double checking everything, covering up mistakes by lying, working long hours/not taking a break, changes to

sleeping or eating habits, increased use of alcohol, tobacco or drugs, poor attitude, behaviour and relationships with colleagues.

- Prolonged or extreme exposure to the possible symptoms of stress is associated with serious chronic or autoimmune diseases such as Crohn's disease, heart disease, back pain, gastrointestinal problems, anxiety or depression. This list is not exhaustive.

3.2 Signs that an individual is experiencing stress will vary according to how the individual reacts to stress. Key for the line manager to be aware of, are changes in an individual's behaviour that are more than just a "one-off" incident. There may be indirect signs of stress indicators being presented by the employee which you also need to look out for. Managers must be alert to 'red flag' language such as an employee describing their role as 'untenable,' or 'at a crisis point'. Such language should be treated as a notification of stress, triggering an informal meeting as per Appendix 1.

3.3 These should be acted upon promptly and discussed with the employee. This will include offering support, such as encouraging the employee to seek advice from their GP, who will be able to make a diagnosis.

4 Support Available

4.1 We will monitor sickness absence and workloads, and ensure that there is clear communication within the school to promote a culture of open communication and encouragement. We will create reasonable opportunities for employees to discuss areas of concern in an environment where stress is not considered a weakness or a failure. We will also hold 'return to work' interviews with employees who have been absent in line with our Sickness Absence Policy, to establish whether there is any underlying problem and, if so, what the employer could do to address it.

4.2 We have measures available to support staff who may be suffering from stress.

- Online training on stress management, to assist staff and line managers in recognising and coping with stress.
- All staff with line management responsibility will receive mandatory 'stress management' training via National College on recognising stress indicators.
- Stress risk assessment and wellness action plans.
- Access to Initio's employee assistance programme (EAP) telephone counselling and referral services for employees, with the potential for face-to face counselling if required.

4.3 We will be alert to the possibility of stress as set out in paragraph 3. However, employees who believe they are suffering from stress should also ask their line manager, the Headteacher or another manager for help and support in the first instance. If you do not feel you are being adequately heard or supported via these channels, then please escalate for further support and assistance by contacting the People Team via hr@initiolearning.org or your school/department dedicated People Business Partner.

4.4 Once an issue affecting an employee's health is brought to our attention, steps will be taken to support the employee to minimise the risk of harm and to identify additional arrangements to reduce the risk of work-related stress to as low a level as reasonably practicable. This may include the measures set out at 4.2 and your line manager, supported with advice and guidance by their People Business Partner, may consider the following in addition, especially when an employee is signed off for more than 28 days with work-related stress:

- carry out further investigations e.g. following an escalation of "unmanageable workload" that has not been resolved within a defined period (e.g., 2 weeks)
- review job descriptions to identify tasks that may involve stressors
- carry out a risk assessment (**template is in Google document library**) to evaluate the risk of work-related stress, considering the existing arrangements that are in place and ensure that significant findings of the risk assessment are recorded
- carry out a stress risk assessment with the employee to identify whether stress is an issue with a view to addressing the situation. A stress risk assessment is available in the Trust's Google Drive: All Schools HR processes and information.

- provide information and training, such as identifying opportunities for development relevant to the employee's position
- refer the employee to occupational health in line with our Sickness Absence Policy
- if an employee is absent from work due to sickness, apply the Sickness Absence Policy as applicable
- conduct an 'Exit Wellbeing Check': In addition to the exit interview survey, it would be advisable to hold a discussion, employee willing, to understand what issues contributed to their reason to resign if they have cited 'work related stress' in their resignation letter.

An Occupational Health referral is not solely to facilitate a return to work; it is a tool to inform the Trust's duty of care. Referrals should be offered even if an employee is in their notice period to ensure the Trust provides appropriate support during their remaining service.

The duty of care and the requirements of this policy remain in full effect during an employee's notice period. A resignation that cites 'stress,' 'wellbeing,' or 'untenable workload' must trigger an immediate review under this policy, regardless of the remaining duration of employment.

4.5 If stress is having a negative impact on an employee's performance, and their performance does not improve despite the manager having taken reasonable steps to alleviate pressure on the employee, it might be necessary for the school/Trust to follow the Capability Procedure.

5 Record keeping and confidentiality

5.1 Information in relation to the management of stress at the school/Trust will be kept to ensure an accurate record is available of what was discussed, actions taken and for monitoring purposes.

5.2 Records will be kept on the employee's personal file or with the school/Trust's H&S records. As part of the application of this policy, the Trust may collect, process and store personal data and special categories of data in accordance with our data protection policy. We will comply with the requirements of **Data Protection Legislation** (being (i) the General Data Protection Regulation ((EU) 2016/679) (unless and until the GDPR is no longer directly applicable in the UK) and any national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK and then (ii) any successor legislation to the GDPR or the Data Protection Act 1998, including the Data Protection Act 2018). Records will be kept in accordance with the requirements of Data Protection Legislation.

6 Review of policy

This policy is reviewed every 3 years by the Trust. We will monitor the application and outcomes of this policy to ensure it is working effectively.

Appendix 1

Guidance for Line Managers and Employees on Managing Stressful Situations within the Trust

The academic year presents various periods that may contribute to elevated pressure on employees. These may include:

1. Dealing with challenging behaviour
2. Ofsted Inspections
3. Organisational Change at Trust or School Level
4. Report compilation
5. Parent consultation evenings/open events
6. Meetings with or emails or calls with parents
7. Accountability measures (targets)
8. Financial management
9. Premises-related matters
10. Recruitment and staffing challenges
11. Workplace conflict

Employee Self-Help in the Workplace

Employees are strongly advised to adopt the following measures to mitigate these areas of pressure:

1. Attend all requisite induction, training, and Inset sessions provided to ensure full awareness of all school processes.
2. Familiarise themselves comprehensively with the established procedure for each circumstance, for example, the School's Behaviour Policy or the Grievance Procedure.
3. Ascertain appropriate avenues for support when required.
4. Acknowledge difficulties and seek assistance and guidance proactively before the situation escalates to an unmanageable level.

General Self-Help Strategies

Additional strategies that can assist in managing workplace stress include:

1. Maintaining a sound diet (e.g., consuming breakfast and lunch).
2. Ensuring adequate hydration throughout the day.
3. Developing effective time management skills.
4. Engaging in regular exercise (including yoga and relaxation techniques).
5. Prioritising time away from work (e.g., avoiding work during evenings and weekends).
6. Minimising procrastination.

Employees who are members of a Trade Union or Professional Association are encouraged to contact their respective body for support and guidance.

Guidance for Headteachers and Line Managers in the Workplace

Headteachers and line managers should implement the following steps to identify and prevent stress:

1. **Peer-to-Peer Support:** Encourage effective communication within the team. Providing employees with a forum to discuss problems with colleagues can reduce the risk of stress. This can be facilitated

through regular team meetings and encouraging staff to approach their manager and colleagues informally with any concerns.

2. **Foster Positive Employee Relations:** Line managers should dedicate time to building rapport with their team members, which facilitates the early recognition of changes in normal behaviour. Integrating this time into one-to-one meetings is considered good practice.
3. **Ensure Appropriate Workload Distribution:** Stress can arise when employees feel overwhelmed by their workload. Managers should regularly review employee workloads, for instance, during one-to-one meetings and regular appraisals. The impact of absences and departures on remaining staff and the equitable distribution of work within the team should be considered.
4. **Ensure Adequate Breaks are Taken:** Managers must verify that employees are not habitually working excessive hours and that they take regular breaks. If an employee consistently works through lunch or beyond their contracted hours, the line manager should determine whether this is due to a temporary increase in work or a long-term issue. Managers should lead by example by taking breaks and observing appropriate working hours.
5. **Conduct Regular Employee Meetings:** Holding regular meetings with team members, incorporating both one-to-one and team settings, regarding their work will provide line managers with a clear understanding of employee activities and any potential issues.
6. **Conduct Performance & Development Reviews (PDR):** Line managers should conduct formal performance reviews with team members in accordance with the school/academy Appraisal policy, providing employees with the opportunity to raise concerns during these meetings. This process should include setting clear, achievable objectives for the individual.
7. **Provide Appropriate Training:** Line managers should conduct regular reviews to identify training and development needs for their team members. Employees should be involved in identifying their own training needs. Where training needs are identified, the line manager should ensure provision of such training. Training is particularly important for employees undertaking additional responsibilities following a promotion.
8. **Maintain Vigilance During Periods of Change:** Line managers should keep employees comprehensively informed and encourage team members to raise concerns during periods of change, such as organisational restructuring. Line managers should be supportive and proactively check in on staff regularly during these periods of uncertainty.
9. **Recruit Employees with Appropriate Skills for the Role:** During the recruitment process, line managers should consider the duties of the position and the requisite skills and experience of the successful candidate. This helps ensure the correct person is recruited for the role, thereby preventing the job-holder from feeling out of their depth.
10. **Act Promptly:** Line managers should take immediate action upon suspecting an individual is stressed or when an employee reports experiencing stress. This should assist in mitigating further stress by jointly reviewing the work situation and stress triggers.

Action Following Awareness by Headteacher/Line Manager

If a headteacher or line manager becomes aware that an employee is experiencing stress, they should arrange a meeting with the employee. This meeting must be confidential, held in private, and maintained as informal in nature. The line manager should inquire whether the employee has been experiencing stress and what the employee considers to be the contributing factors. Appropriate questions may include:

- “I am concerned that you appear to be under some pressure. Could we discuss this?”
- “One of your colleagues has confidentially expressed concern about your wellbeing.”
- “Are there any personal matters you wish to discuss?”
- “I am committed to resolving this issue. Do you feel that additional training or support might be beneficial?”
- “Have you discussed this with your General Practitioner? I will provide you with information regarding the organisation’s counselling service in case you find this helpful.”
- “I suggest we meet again in a couple of weeks to review the situation, but in the interim, please do not hesitate to contact me if you have any concerns.”

Following the meeting, the headteacher/line manager may need to conduct a more detailed investigation to establish the causes of and contributing factors to the stress, particularly if the employee alleges the cause is poor management or bullying, for example. Once the reason for the stress has been established, the line manager should explore potential steps the organisation could take to alleviate the situation.

Appropriate actions for the line manager to help relieve the employee's stress include:

1. Implementing a phased return to work (following sickness absence).
2. Reviewing the Trust’s Sickness Absence Policy and the reasonable adjustments clause (following sickness absence).
3. Reviewing the Trust’s Promoting Positive Mental Health & Wellbeing Policy.
4. Conducting a stress risk assessment.
5. Implementing temporary or permanent flexible working arrangements, such as reduced hours.
6. Redistributing a portion of the employee's workload.
7. Reviewing the job description, leading to a temporary or permanent change in duties.
8. Providing training for the employee.
9. Referring the employee to the Trust’s Employee Assistance Programme, which offers a course of 6 counselling sessions and other free online resources that support staff with stress.
10. Establishing a mentoring arrangement.
11. Verifying if the employee has sought medical support from their GP, or advising them to do so.

This list is not exhaustive.

The appropriate course of action will be contingent upon the specific circumstances, the individual, including the reasons for the stress, the nature of the job, and what is deemed reasonable.

Appendix 2

Equality Impact Assessment/ Analysis (EIA)

Step 1: Scoping and Identifying the Aims

School/Service	People Department
Title of Change:	Stress Management Policy
What are you completing this EIA for?	Policy
Is this a new or existing activity or change?	Existing
What are the main aims / objectives of the changes?	Ensure policy is still relevant and the most current legislation is being adhered to.
What is the context for this EIA? e.g., policy, practice, service, curriculum proposal or project?	
Why is the activity/change needed? E.g., The policy or practice affect different "protected groups" differently?, enhancing of services, education	
Name/s of people and Date undertaking analysis:	Shani Davies, Director People & Culture
Who will be affected by this activity/change? eg pupils/students, service users, employees, wider community	All Staff in scope of this policy
Does it relate to an area with known inequalities? E.g., access to service for disabled people, pupils/students, vulnerable pupils/students, SEND, racist bullying etc.	
EIA Schedule When will the EIA be reviewed?	

Step 2: Assessing the Impact

Detail any positive or negative impacts of this document /policy on pupils/students and staff in the box below. If there is no impact, please select "not applicable"

Protected Characteristic	Positive Impact(s)	Negative Impact(s)	NA	Action to address negative impact: (e.g. adjustment to the policy)
Sex consider issues for: men and women, non-binary.	Y			
Gender reassignment E.g. privacy of data and harassment	Y			
Disability e.g., attitudes, physical, social barriers, visible and non-immediately visible disabilities, neurodivergence, learning disability	Y			
Age e.g., consider all ages but there may be some issues that relate for example to older people/younger people	Y			
Sexual Orientation consider heterosexual as well as lesbian, gay and bisexual (and other sexual orientations)	Y			
Pregnancy and maternity	Y			

e.g., childcare, working arrangements, part time working				
Marriage and civil partnership	Y			
Religion or belief consider religions, beliefs, or no belief	Y			
Ethnicity / Race e.g., language barriers, different ethnic groups/nationalities	Y			
Socio-economic factors e.g., resident status – socio economic/low-income groups, migrants, carers, impacts on children and families (please state)	Y			
Mental health e.g. short term, long term, acute, fluctuating mental health conditions, impacts	Y			

If you answer yes to any of the following, you MUST complete the evidence column explaining what information you have considered which has led you to reach this decision.

Assessment Questions	Yes / No	Please document evidence / any mitigations
In consideration of your document development, did you consult with others, for example, external organisations, employees, pupils/students, carers or community groups?	Yes	Staff and Trade Unions
Have you taken into consideration any regulations, professional standards?	Yes	Health and Safety at Work Act 1974, ACAS, CIPD

Step 3: Review, Risk and Action Plans

Low – No major change	Medium - Adjust the policy	High – Stop and remove
The activity is robust and there is no potential for discrimination, and you have taken all appropriate opportunities to advance and foster relations between groups.	This involves taking steps to remove barriers or to better advance equality. It can mean introducing measures to mitigate the potential effect.	If there are adverse effects that are not justified and cannot be mitigated, you will want to consider stopping the policy/project altogether. If the activity shows unlawful discrimination, it must be removed or changed.

How would you rate the overall level of impact / risk to the school / service / Trust if no action was taken?	Low	Medium	High
	x ☐	☐	☐
What action needs to be taken to reduce or eliminate the negative impact?	N/A		
Who will be responsible for monitoring and regular review of the document / policy / change?	Director People & Culture		

Step 4: Authorisation and sign off

I am satisfied that all available evidence has been accurately assessed for any potential impact on pupils/students and employees with protected characteristics in the scope of this project / change / policy / procedure / practice / activity. Mitigation, where appropriate has been identified and dealt with accordingly.

Equality Assessor:	Shani Davies	Date:	19/2/26
---------------------------	---------------------	--------------	---------